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Frequently Asked Questions

 Look for the PatientCollector symbol  in the documentation for important user tips, product details and troubleshooting .

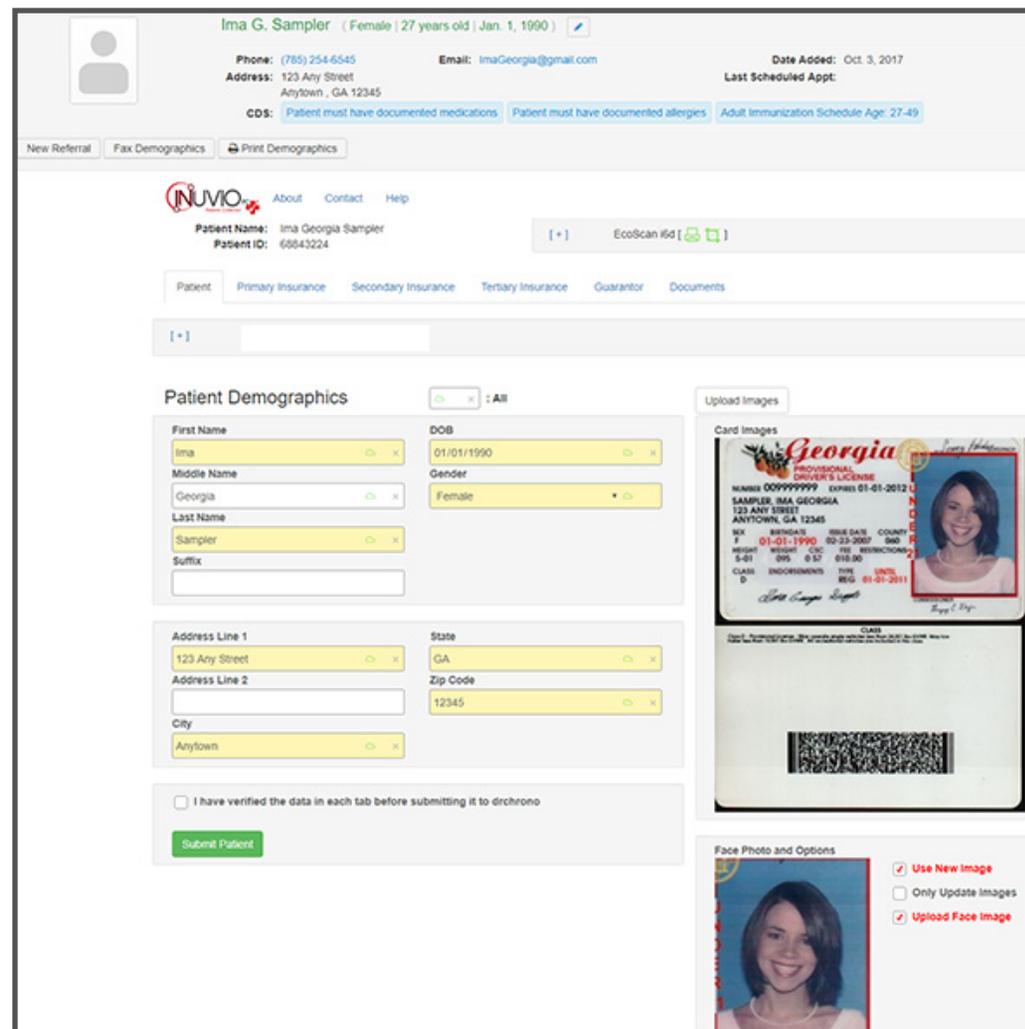
Getting Started

Thank you for choosing PatientCollector. PatientCollector is a browser-based service that assists drchrono® users with the proper collection and filing of patient information at your medical practice's front desk. PatientCollector extracts the data from identification and insurance cards, importing the images and the data directly into the patient dashboard, and provides an easy entry point for filing patient documents.

PatientCollector Layout Overview

To the right is the layout of PatientCollector.

PatientCollector allows you to modify existing patient data pulled from drchrono® and to submit new patient data to any patient record (first name, last name) in drchrono®. When images have already been added to the patient record, they will be displayed in PatientCollector, as shown here. These card images and the corresponding data can be overwritten with new card images and/or new data, to update demographic information or to add/modify an insurance policy.





Internet Explorer
Users: You will need to right-click and install Dynamic Web TWAIN as an administrator. If multiple users use the same workstation, you must install for all users.

Scanning Basics

To utilize PatientCollector, it is important to note a few basic mechanics of the service.

Browser Compatibility

Any drchrono® approved browser is compatible with PatientCollector. For the best speed and usability, we recommend Google Chrome.

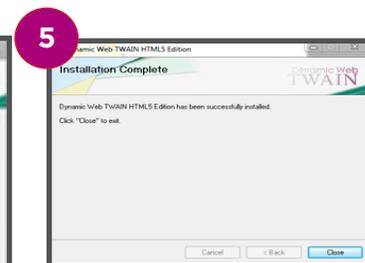
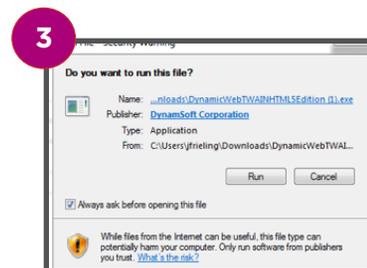
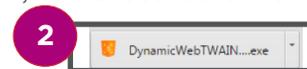
Dynamic Web TWAIN Installation

Specifically designed for web environments like drchrono®, Dynamic Web TWAIN allows PatientCollector to communicate with a scanner via a browser interface. This software must be installed to submit card images and documents to the service.

When a PatientCollector link is clicked for the first time on a computer, you will be prompted to install Dynamic Web TWAIN. Click Download & Install Plug-In¹.

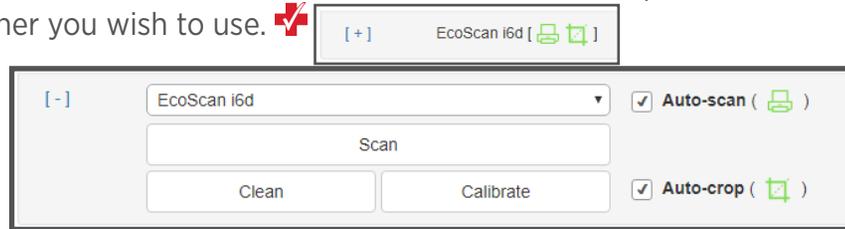
After you have been prompted to download the plug-in, the executable file will be shown at the bottom of the browser. Click to install².

After running the executable, click Run³, then Next⁴ and finally Close.⁵



Scanner Selection

A scanner must be selected to scan into the PatientCollector interface. If there are multiple scanners at the workstation, please choose the scanner you wish to use. 



[-] EcoScan i6d [+] EcoScan i6d [ ]

[-] EcoScan i6d Auto-scan ()

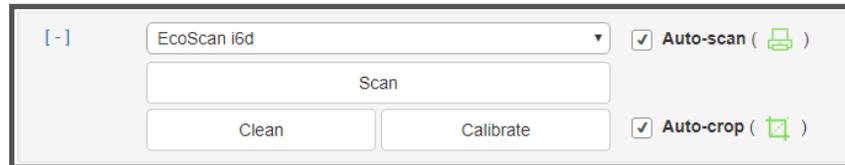
Scan

Clean Calibrate Auto-crop ()

 If there are no scanners shown, please make sure the scanner is connected to the computer and powered on. If the issue persists, you may need to reinstall the scanner drivers. Check to see if your scanner drivers are available at <http://inuvio.com/service/downloads/> or visit the scanner manufacturer's website.

Auto-Scan

Most TWAIN-compliant scanners are compatible with Auto-Scan, by which a scanner detects the card and automatically scans without further prompting. PatientCollector supports Auto-scan, but should your scanner not support this feature, use the manual  button to start a scan.



[-] EcoScan i6d Auto-scan ()

Scan

Clean Calibrate Auto-crop ()

Simplex vs. Duplex Scanning

Simplex scanning is acquiring only one side of a card or document at a time. Duplex scanning is when a card or document has both sides acquired at once. While PatientCollector does accept and process single card images, scanning both the front and the back of the card simultaneously (duplex) or consecutively (simplex) will yield better data extraction results. For documents, be sure to check/uncheck the

 Two-sided () toggle as needed.

Image Quality

PatientCollector's ability to process and extract data from card images depends on the quality of the images submitted to the service. Worn or blemished cards may produce degraded extraction results. In the same manner, some scanners produce better images than others. For a list of recommended scanners go to <http://inuvio.com/scanners/>.



Sheet-fed Scanner Maintenance

A6 and A4 card scanners (EcoScan i6d/i4d) require regular maintenance in the form of cleaning and calibration to produce consistent high quality card images. If you do have one of these units, please be aware that, over time, the scanner bed will acquire dust and grime. Monthly cleaning and calibrating will significantly improve card image quality, the accuracy rate of the service, and increase the longevity of the life of your scanner.

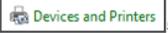
Notice the lines on the card image from a scanner that has not been cleaned or calibrated recently. This image would have a low probability of proper data extraction as the alpha-numeric digits aren't quite clear.



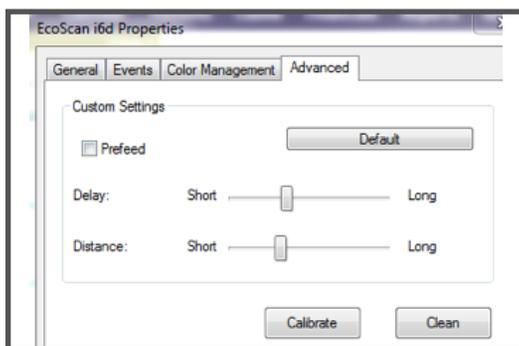
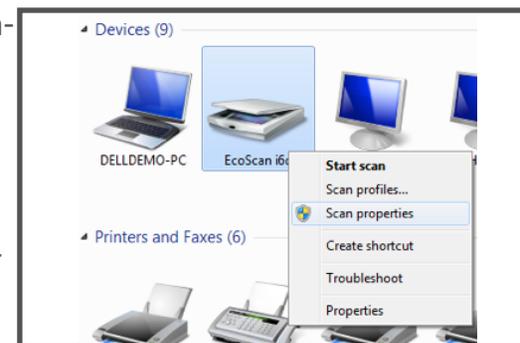
After the scanner has been cleaned and calibrated, data extraction has a much higher probability for success.

 On rare occasions, new card variants are issued that PatientCollector will immediately not recognize. These variants will be supported within two business days in most cases.

Cleaning and Calibrating

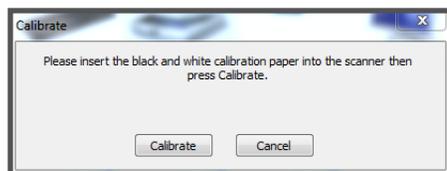
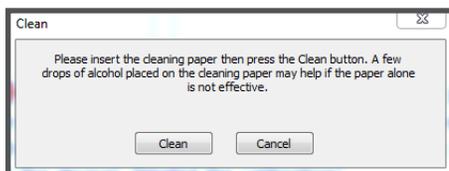
A6 and A4 scanning (EcoScan i6d/i4d) units require monthly maintenance and come with cleaning and calibration sheets. Store these sheets in a safe place where they won't be bent and can be utilized for future scanner maintenance. To clean and calibrate your scanner, click the Windows® button, and select the  on your computer. Next, click , right-click the desired scanner and choose  as shown.

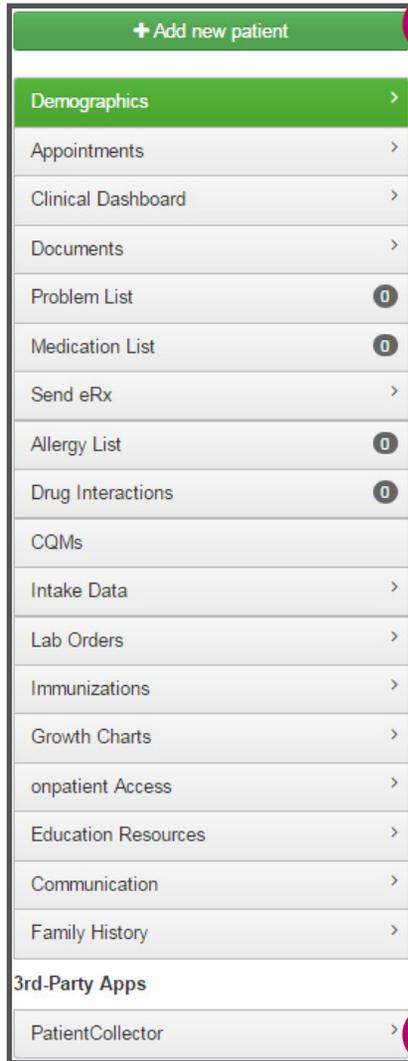
When the scanner's properties window is open, click the Advanced tab and you will see the Calibrate and Clean buttons.



Clean the device first by applying isopropyl alcohol  across the leading edge of a cleaning sheet. Click , and insert the cleaning sheet into the scanning unit. Click  on the new window prompt. After the scanner has completed the cleaning process you must calibrate the device. Locate the calibration sheet. Click , and put the calibration sheet arrows first into the device. Click  on the new window prompt.

 99% alcohol is recommended when applying alcohol to the leading edge of a cleaning sheet.





Data Entry Basics

This section covers the mechanics of scanning cards and submitting the data to drchrono® via PatientCollector.

Accessing PatientCollector

Whether a new or current patient, PatientCollector^A is accessible under the 3rd-Party Apps on the left hand tool bar in the patient dashboard. If a new patient does not have a chart entry yet in drchrono®, the + Add new patient^B link can be used from the Patient List or another patient record to create a new patient profile. By simply filling in the first and last name of the patient and saving, you've now created a record that can be found using the Patient search... bar. Find the new patient, click to access the newly created patient dashboard and use PatientCollector^A to update the patient demographic and insurance information.

When PatientCollector is opened, all the relevant patient information and images from drchrono® will be populated in PatientCollector. Any newly scanned images and extracted/edited data in PatientCollector will be updated in the drchrono® patient record upon submission.

Extracting Demographic Patient Data

Once PatientCollector is open (and scanning has been properly enabled) you are ready to begin extracting patient data. If you have the Auto-scan button enabled Auto-scan (), insert a patient identification card into the scanner. If the Auto-scan button is not enabled, insert the card and press the button.

When an identification card has been scanned, PatientCollector will receive the uploaded image, perform image and data processing, denote the card as an identification card, and extract the data from the card. The card image and extracted data will then be presented to you to verify that the information is correct and is ready to be used to update the patient's demographic profile in drchrono®. PatientCollector uses colorful visual indicators to help easily identify which data elements have changed from their prior values (orange) and which elements have stayed the same (green). For instance, the example to the right shows when an existing patient has a new ID with an updated address and zip code.

To use the extracted data and upload the scanned card images, make sure Use New Image is checked. Additionally, to upload the patient face image from the identification card, make sure Upload Face Image is also checked. In the case that only the card image needs to be updated in the patient file, make sure Only Update Images is checked.

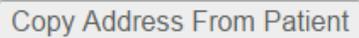
 Always verify that the data on the card image matches the data in the fields before submission.

 Fields with a yellow background denote required fields in drchrono®. When creating a new patient via PatientCollector, these yellow fields must be filled-in or you will be prompted to do so. If you have entered PatientCollector via an already existing patient file no prompt will appear and any yellow fields not filled out will retain their prior values in drchrono®.

The screenshot shows the INUVIO PatientCollector interface for a patient named Ima Georgia Sampler (ID: 68643224). The 'Patient Demographics' section includes fields for First Name (IMA), Middle Name (GEORGIA), Last Name (SAMPLER), Suffix, DOB (01/01/1990), Gender (Female), Address Line 1 (123 ANY STREET), Address Line 2, City (ANYTOWN), State (GA), and Zip Code (12345). A 'Card Images' section displays a scanned Georgia Professional Driver's License for Ima Georgia Sampler, with a 'Face Photo and Options' section below it. The 'Face Photo and Options' section includes a photo of the patient and three checkboxes: 'Use New Image' (checked), 'Only Update Images' (unchecked), and 'Upload Face Image' (checked). A 'Submit Patient' button is visible at the bottom.

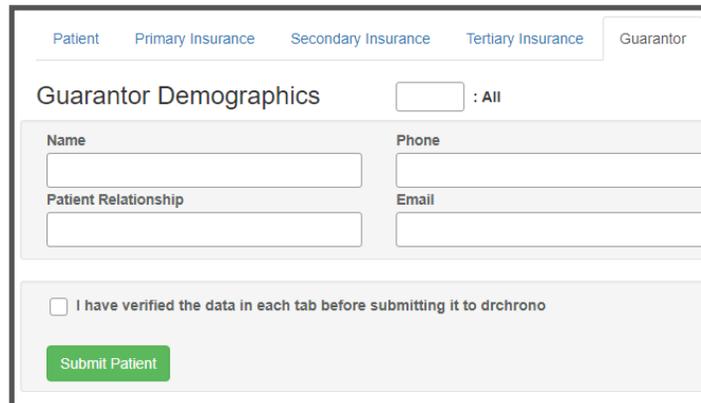
Copying Addresses

After an identification card has been scanned and the extracted data is displayed in PatientCollector, there are copy address buttons in each tab of PatientCollector that will duplicate this address information between tabs.



Patient Relationships to Guarantor, Insured

In the case that a Guarantor is present, click on the guarantor tab to scan an identification card and extract the guarantor demographic information.



The screenshot shows the 'Guarantor' tab selected in the application. The form is titled 'Guarantor Demographics' and includes a dropdown menu set to 'All'. The form fields are:

Name	Phone
Patient Relationship	Email

Below the form, there is a checkbox labeled 'I have verified the data in each tab before submitting it to drchrono' and a green 'Submit Patient' button.

 When in the Patient and Guarantor tabs, any identification card scanned will go directly into that tab without further prompting. Outside of those tabs, you will be prompted to determine where a newly scanned identification card should go.

Extracting Patient Insurance Data

When an insurance card has been scanned and processed, Patient-Collector will denote it as an insurance card and automatically ask whether the insurance policy is primary, secondary, or tertiary insurance.

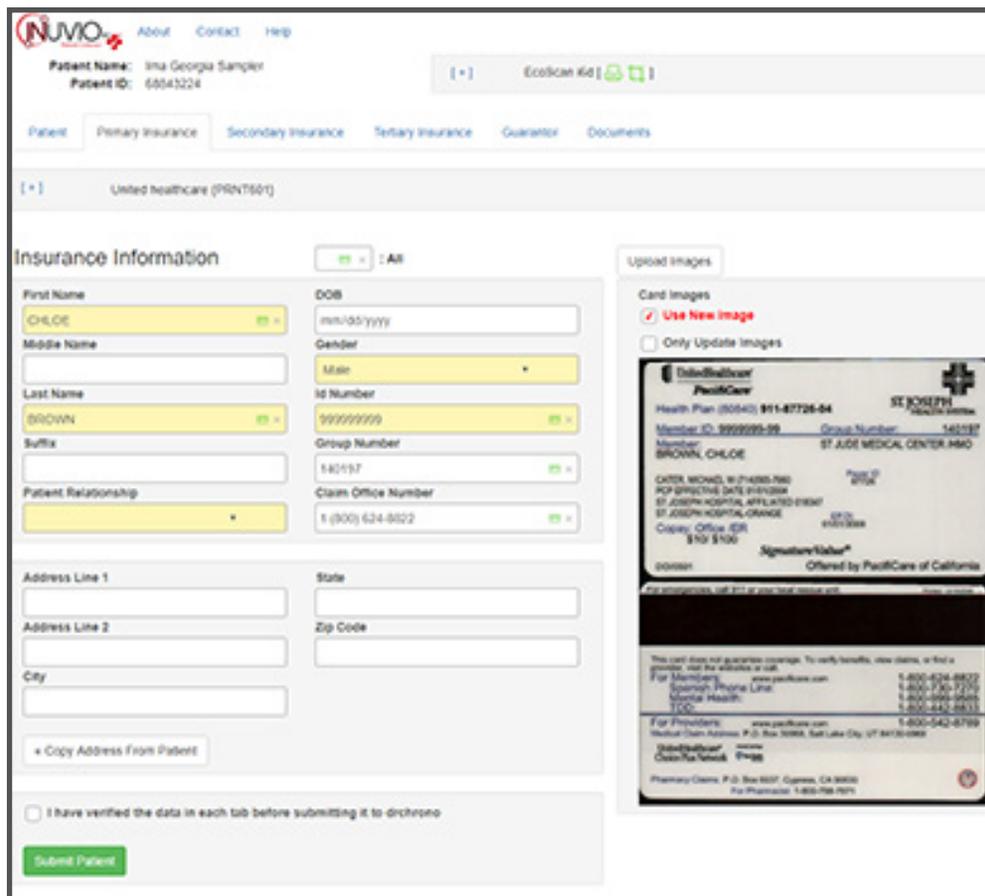
After the card has been processed and data extraction has occurred, verify that the data from the card has been successfully extracted. PatientCollector uses colorful visual indicators to help easily identify which data elements have changed from their prior values (**orange**) and which elements have stayed the same (**green**). Always verify that the data is correct before submission.

 On rare occasions, new card variants are issued that PatientCollector will immediately not recognize. These variants will be supported within two business days in most cases.

If a patient's insurance information has been pre-verified prior to their visit, you will want to select Only Update Images in order to prevent the system from marking the updated policy record as unverified. In such case, extracted insurance information will be ignored on submission and only the images will be uploaded to drchrono®.

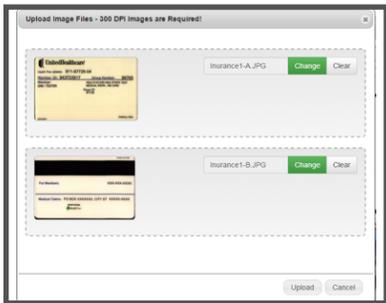
Where should the data go?

Where would you like to put the data?



The screenshot shows the INUVIO PatientCollector PC interface. At the top, it displays the patient name 'Ima Georgia Sampler' and Patient ID '68843224'. Below this, there are tabs for 'Patient', 'Primary Insurance', 'Secondary Insurance', 'Tertiary Insurance', 'Guarantor', and 'Documents'. The 'Primary Insurance' tab is selected, showing 'United healthcare (PRTN7601)'. The 'Insurance Information' section contains fields for First Name (CHLOE), Middle Name, Last Name (BROWN), Suffix, Patient Relationship, DOB, Gender (Male), Id Number (999999999), Group Number (140157), and Claim Office Number (1 (800) 624-8122). There are also fields for Address Line 1, Address Line 2, City, State, and Zip Code. A 'Copy Address From Patient' button is present. At the bottom, there is a checkbox 'I have verified the data in each tab before submitting it to drchrono' and a 'Submit Patient' button. On the right side, there is an 'Upload Images' section with a 'Use New Image' checkbox selected and an 'Only Update Images' checkbox. Below this is a scanned image of a PacifiCare insurance card for Chloé Brown, Health Plan (20140) 911-87726-04, Member ID: 999999-29, Group Number: 140157, and other details.

+ 300 DPI images are required for the service. Higher DPI images will slow down the service and your browser, and may be rejected by drchrono. Lower DPI images will likely produce poor, erroneous extraction results.



+ You will still need to perform patient insurance eligibility checks as the data on an insurance card cannot confirm current eligibility status or benefits.

+ For IE users, make sure the insurance package you selected is highlighted in blue before submission.

Digital Health ID Cards

When a patient has a digital insurance card, that card can still be used in conjunction with PatientCollector to put the appropriate insurance information/card images into the patient chart. Direct the patient to email the digital file to a secure email address that can be accessed by the front desk. To upload the digital health ID card to PatientCollector, open PatientCollector, select the correct insurance tab and click the **Upload Images** button. You will then be presented with a screen that allows you to either select the image from file, or drag the image into the box for upload.

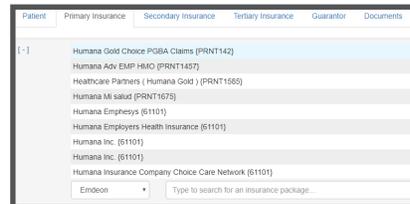
+ Though PatientCollector only accepts single card images for data extraction, a single file with multiple card images can still be submitted, but data extraction is not likely to succeed in such circumstances.

Coverage Priority

When a patient has multiple insurance policies, a Primary insurance policy must exist before a secondary insurance policy can be added to drchrono®.

Insurance Packages

In PatientCollector, when an insurance card has been scanned, you must select a payer type and an insurance package from the practice site's pre-configured package list prior to submission. Each patient's insurance card/coverage must be linked to a pre-configured insurance package in drchrono® for proper claims processing.



Either browse the Insurance Package drop-down list or type the carrier name from the card into the search box. Locate the correct insurance plan in the list and click it. The package will be highlighted to denote the selection. On submission, the patient's insurance policy will be linked to the pre-configured insurance package in drchrono®. Always ensure that the proper insurance policy is selected before submission.

Data Toggle Switches

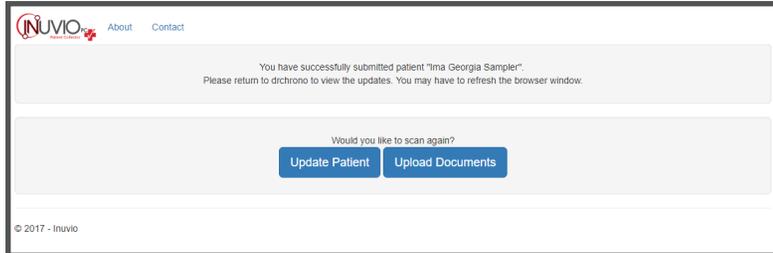
Next to each field in PatientCollector, there can be three toggles depending on the source of the patient information. 

The color of the icon denotes where the information currently displayed in PatientCollector is coming from. The cloud icon  denotes information from drchrono®. The card icon  denotes data extracted from a recent scan. If the icon is green, then that is the source of the data in the field(s). To remove all data from a field, click the  icon.

Confirmation Display & Final Submission

I have verified the data in each tab before submitting it to drchrono

Once the data has been verified as correct, check the box confirming that the data was verified and click the **Submit Patient** button. After the card images and information have been successfully submitted to drchrono®, a screen will appear indicating the successful entry of the new data.



The updated data will now be available in that patient’s Demographics tab. The card images will reside in the Documents tab in drchrono®.

If you neglected to add another card for that particular patient to the record, you can click **Update Patient** to quickly go back in PatientCollector. To submit a patient document for that same patient, click **Upload Documents** and you will go directly into the PatientCollector Document Upload section for that patient.

Document Upload

With PatientCollector you are able to take any patient-specific document, scan it, and add it to the patient record.

Document Upload Basics

To upload a document into a patient's record in drchrono®, go to PatientCollector and click the tab titled Documents. Because document upload is separate from card data extraction, a prompt will denote that any data in PatientCollector should be submitted and saved before moving to document upload. When you are ready, click "Yes, I want to go to Documents."^A

A scanner must be selected from the Select Scanner^B drop down list prior to scanning. This selection will be remembered for future scans. Additionally, Auto-scan is available for those scanners that support it, as well as Two-sided scanning for documents printed on both the front and back of a page. Toggle as needed from document to document.

Document Filing and Notes

To properly file a document, there are a number of different actions to take. First, Select a doctor^C from the drop down list. Second, type in a Description^D of the document for labeling/explanatory purposes. Lastly, add Metatags^E that properly classify the document being submitted. To add a metatag, type a metatag into the small box next to Add and click Add. Repeat for all relevant metatags.

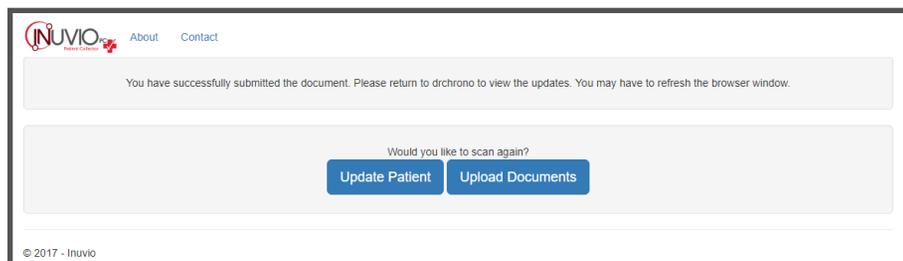
Cropping, Rotating, and Reordering Pages

When a document is scanned into PatientCollector, sometimes that document needs additional care before submission. There are multiple tools available to you to modify the document.

If the image of the document is not properly cropped from the scanner, click  to resubmit the document to PatientCollector for an additional crop. The   buttons will change the page order for multi-page documents. The   buttons allow the user to rotate the document and, finally,  will remove any page not needed.

Confirmation Display & Final Submission

Click  when the document is ready to be added to the patient's record. After the document has been added to the patients Documents Tab, the user will see the successful submission prompt.



The patient's Documents tab in drchrono® will now have the document, as well as the appropriate tags and descriptions. If you needed to upload another document to the same patient, click  to submit another document to the patient record without having to go into the patient record.



Frequently Asked Questions

Does PatientCollector work with Mac?

Yes, PatientCollector is usable in a Mac environment. Currently only the Panasonic KV-S1026c scanning hardware is compatible though.

Why, when I wake my computer up, does my scanner delay or not power on?

When a computer goes to sleep, most of the processes it runs are suspended for energy efficiency. Sometimes scanners have issues reconnecting with the computer when they wakes up. Typically unplugging the USB cable from the back of the unit, and then re-plugging it back in will successfully reconnect the scanner.

Why can I not see any scanners in the scanner selection panel?

Dynamic Web TWAIN and the scanner's TWAIN drivers must be installed for PatientCollector to recognize a scanner. For a list of Inuvio's recommended scanner driver's go to <http://inuvio.com/service/downloads/> or visit the scanner manufacturers website.

Why can't I get Dynamic Web TWAIN to install?

For security purposes, most practices IT only allow those user's with administrative privileges to do additional software installations. Please contact your network administrator to install.

Why does it take so long to update a patient record via PatientCollector?

PatientCollector is dependent on the internet connection speed of a practice. Additionally, when high DPI images are in use, naturally upload times will increase.

Why is PatientCollector not pulling the face image from an identification card?

If the image quality of a ID card is less than ideal, cleaning and calibrating your scanner may allow PatientCollector to better match the ID and thus pull the face image from the card. Alternatively, if the ID is a new card to the market, Inuvio will be notified and the system will soon be updated with the new ID in a couple of business days.

What browsers does PatientCollector work best with?

PatientCollector is engineered, tested and optimized to work with the latest iterations of Internet Explorer, Mozilla Firefox, and Google Chrome. If you are seeing issues with PatientCollector not functioning correctly, please check and make sure you are using the latest iteration of your browser of choice. Google Chrome is recommended by drchrono® and Inuvio alike.

Why doesn't PatientCollector collect driver's license numbers, state the card was issued in and the expiration date?

PatientCollector collects most information from a driver's license but is only able to serve up particular data types to drchrono®. We hope to include these demographic fields after future updates.

I'm having trouble accessing the service through my firewall. What can I do?

To access PatientCollector through a firewall, your administrator will need to unblock access to inuvio.com and the subdomains of Inuvio.



Why isn't my scanner working with Windows 10?

When a computer is upgraded to Windows 10, you may need to unplug your scanner and reinstall your scanners drivers to the latest versions to work with Windows 10.